

Meet the Instructor

Hello, my name is Gregg Morgan. I'm a native of the Salt Lake Valley. I'm married, I have six great children. They range in ages from 17 to 32 and one is still at home. I graduated with a degree in Outdoor Recreation Planning at Utah State University quite a few years ago. My first job was at the Salt Lake District; coincidentally as the first Area Recreation Planner in the Pony Express Resource Area.

The wilderness program was beginning then, and I remember, expressly, the excitement of being able to go out and hike and bike and fly and get around those wilderness islands during that first three years of wilderness inventory.

Over the years, I had an opportunity to issue a wide variety of special recreation use permits. But, in particular, the Bonneville Salt Flats program was exciting. The filming events that happened right there and the high-speed time trials were quite exciting. And the state of Utah, for many decades, had issued the permits and when they got out of that Salt Flats Administration and gave it back to the BLM, I had the opportunity to be the first to go into it and interface with some real flamboyant racers and personalities. That was exciting, but just being out on the Salt Flats, indeed, was a very sublime opportunity.

I took the Lead Outdoor Recreation Planner position on the ONC district in Roseburg, Oregon in 1992 where I've been working ever since. In that district, we have highly developed recreation sites. So, on like the Salt Flats, we have a 20 recreation sites that I had the opportunity to inventory, renovate because of the good funding sources that we had. Over the years probably the most exciting part was getting into designing and seeing through construction two group campgrounds, three day use areas, and a couple of boat ramps. The North Umpqua Wild and Scenic River was a fantastic place to fish and to raft and to administer. Two by-ways were exciting and endless opportunities and interest that I've taken in photography has happened in that district.

Being in the outdoors gave me an opportunity and kind of a need to become an EMT and I've been certified in that capacity since 1980. I've started an ambulance business, an EMT association back in Salt Lake City and continue to certify by volunteering with the Glide Rural Fire Department on their ambulance service.

I've been on the RMiS since about 2001. It's been a great opportunity, a good team, and I've enjoyed seeing the progress and the development of the RMiS program. I wish you the best in your recreation endeavors.

Introduction and Purpose

Welcome to the RMiS online training program. My name's Gregg Morgan, I'm the Senior Recreation Planner at the Roseburg District office in Oregon. I'm glad you're here to learn or update your knowledge about partnerships and agreements in RMiS. What you'll see and learn today is so much easier than what we had years ago. Believe me, it was a real challenge when RMiS ran under the DOS format. The upgrade to a Windows environment on the internet has been wonderful. Partnerships and agreements are an important component of RMiS. At the end of this training session, you will be able to explain the purpose of documenting partnerships and agreements, locate and be familiar with the types of partnerships and agreements, be familiar with agreement categories of existing, new, or expired. Create or open agreements and enter information including the name, the type of agreement, fiscal and expiration year, the purpose of the agreement, accomplishments to date, the NLCS (National Landscape Conservation System) affiliation, the contribution category, dollar values, hours worked, and the program category. You'll also be able to run a report on partnerships and agreements.

Before we begin, one might ask what is the difference between a partnership and an agreement. A partnership is a cooperative adventure between two or more parties who combine complimentary resources to establish a mutual benefiting project. Over the years you'll learn that a successful partnership results in a win-win situation. An agreement is the instrument to formalize the partnership with a cooperating individual group or entity. Most of the times, the two terms can be used interchangeably. Another question you may ask, what kind of agreements can be entered in to RMiS? RMiS was designed to store information for a variety of agreements, with the focus on recreation. But over the years, a lot of non-recreation staff have found RMiS to be a great storage place for agreements in their disciplines like wildlife or range programs. RMiS will accommodate these, but one caution is that when you run a standard report, don't just

look at the bottom contributions line. All partnerships add to that total, there's no separation for non-recreation information.

It's important to note some of the reasons we document partnerships and agreements. We know that partnerships broaden ownership in various projects and increase public support for land management goals. We enter into an agreement, execute the plan, and document what's been done. Partnerships can increase stewardship of public land resulting in longer viability of BLM management efforts.

So first, we enter partnerships and agreements to document a purpose and track accomplishments. There is valuable information, such as donations, grants, volunteer hours, or supplies received. These are particularly important when you want to demonstrate how well your office can leverage appropriated or other grant funds. It also leaves a good record for your replacement in the years to come. It's an easy place to see overall recreation partnership accomplishments.

Secondly, RMiS provides information to managers and other BLM staff, including state office and Washington office personnel, to log in as a guest and review the partnerships that you have completed or are working on. Another reason, you'll be able to print an end-of-year report for your district office or field office volunteer coordinator.

PA Categories and Types

There are three categories of agreements in RMiS, existing, new, and expired. Existing agreements carry over each fiscal year as long as you haven't reached the expiration date. When you create a new agreement, RMiS brings up a blank editor page to fill in and save. Expired agreements carry over but don't show up on the active list. They have reached their expiration date which hides them after the end of the fiscal year in which they expired. You can retrieve and edit them, if you need to, or they're maintained in RMiS as a historical reference. There are 14 agreement types in RMiS. We will explore them in a few moments. But first let's go further into new, existing, and expired agreements.

Create and Edit PA's

Creating a new agreement. Once you've logged into RMiS, you can access Partnerships and Agreements by clicking on that button on the green menu bar. To begin a new agreement, click on the new button and the editor will open giving you a blank page to input your information. I'll go ahead and enter an agreement that we'll be making for the North Umpqua Scenic Byway grant and we'll assign it a number which may be unique to your office, it doesn't have to be the same as everybody else's.

The next thing I'll do is I'll pull down this toggle and I'll take a look. Now this is important because this is the location that you can see what types of agreements there are in RMiS. There are 13 or so. If you don't find one that fits your occasion, you can select other. In this case we'll select Assistance Agreement. I won't go over those in any further detail. You can read about them in the manual, there's a short definition on each one of them.

But to go over a few briefly, do you know the difference between inter-agency and intra-agency agreements? Inter-agency being an agreement outside the DOI and intra-agency being an agreement within the interior agencies. Just like our intranet line inside BLM's firewall.

Are you aware that a MOI is used when there is no exchange of funds, goods, or services? It's a handshake agreement spelling out the overall policies and procedures and to confirm mutual assistance in desired results. The MOI has been largely misunderstood to be some master agreement along with a grant or a contract.

Another one, did you know that a Sikes Act Agreement may only be written with a state wildlife agency for work to be performed that's in an approved habitat management plan? Yes, indeed.

More common now are assistance agreements. These fall under two types: grants and cooperative agreements. They're discussed in manual 15.11 in the Grant and Cooperative Agreement Act. The BLM and recipient perform work efforts together. BLM has normal oversight over the work effort. One of the examples would be in developing an assistance agreement with the Federal Highway Administration or U.S. DOT (Department of Transportation) where they fund the Highway Enhancement project along a BLM scenic byway or back country byway.

Continuing down the editor screen, fill in the fiscal year and note that an agreement won't show up as expired until October 1st when the next fiscal year begins. Your anticipated fiscal expiration date, in this case it will take us a few years to get something built. If the area falls within a NLCS unit, check that and its affiliation, in this case the Wild and Scenic River. I pre-filled in the purpose, but these boxes will continue to accept type and it'll just scroll on and on and on. What I suggest that you do is put down you initial and last name, the date that you entered the purpose, and what the purpose was for this project. Then in a case of accomplishments to date, you might go ahead and put down your name again, when you submitted for something like an application for a grant, what you might have received, and what it was for. As you continue to progress through the months and years, you can add more on to that and re-save it.

Now, down in the details portion, select the insert button and you'll go ahead and put down the, let's say in this case, the Federal Highway Administration. But like things, like Public Lands Day, when there might be a Boy Scout troop and an individual and a fishing association show up at one project, you can put a line in for each one of them under Public Land Day type of activity or agreement. So then what you'll do is you'll select for our case, the Federal Highway Administration has granted funding in 2009 and has come up with an amount of money and insert if you've got somebody else. In this case ODOT, Oregon Department of Transportation, is supplying labor in 2009 and '10 and '11 to the tune of a certain amount and you can go ahead and save that. Now if you reimburse them on this, I wouldn't show the \$20,000 here. This is only if they contribute their time to this effort. Otherwise, your report will add these two things up.

Here's a situation I'd like to show you a little difference between the types, and that is that all agreements except volunteer will have just these four columns up through dollar value. However, if you select a volunteer agreement, like we have in this case for an Eagle Scout project, all of these types of agreements for volunteers have two additional columns to fill out. That is volunteer hours, in this case after looking at a fence that was built and installed at one of our campgrounds, that group spent, in labor time, 150 hours and in materials and supplies time, two hours in purchasing a few things. Also into the program, you will select recreation. And so, in this case, like I mentioned

before, there might be some other program that wants to keep track of what type of project it was; recreation and recreation and save.

To edit an existing agreement, go ahead and move back into Partnerships and Agreements and in this case rather than starting a new one, we pull the toggle bar down that shows all of the existing agreements that have not expired. In this case, we'll just go into the campground host at Cavitt Creek and to enter the editor to edit any current information, we'll select on the hyperlink, and now we can go ahead and select or make any changes that we see fit. If the fiscal year changes, if there's additional information on accomplishments to date, probably the most important, or you need to add a line to the details of what they contributed as far as labor or other categories and the dollar value associated, then go ahead and save.

To retrieve an expired agreement or be able to see it, first note that when we look at the active agreements, there are quite a list right here, but what we do, is we'll go over and we'll click on the show expired. Once we do that, they're showing that list now and we can hide them again, but let's take a look at them first. We can notice that the ones with an asterisk, in this case, there are only three because expired agreements are relatively new. And even though most of us in our districts and field offices have deleted old ones, we're not going to revive those because they weren't saved.

And now that we have the expiration dates, those can be historically saved and retrieved at a later date. In this case, let's go ahead and bring up the new wave agreement that I've created and notice that it's just a generic purpose and accomplishments and a party name with some details there. And that will continue to be there as an expired agreement, but if we go back to, let's go back to the office and back into Partnerships and notice that every time we do that, they're not going to show. So to show it, I'm going to have to hit this again and it will be there. To hide those expired agreements, I click on hide expired and they're gone. Though, one of the questions you might ask is, in RMiS can we delete any of our agreements or partnerships? The answer is yes. In this case, since I'm in live RMiS, I don't have much value for this one. The only way to do it is to go into the editor. So I click on the hyperlink and you will note that you have a delete button here. If we don't need this one for any information in the future, go ahead, click delete, it'll ask you if you permanently want to lose that information, say ok and it is

gone. So let's go back into show expired since that was an older one and you'll notice it's not there anymore.

Another point I'd like to make on reviving expired partnerships, and I've already pushed the show expired, so you see my asterisks that have the older, expired. In this one, Douglas County Inmates Work project, I want to bring that up and let's say, for example, that since this expired in 2007 and they have come back and expressed interest in doing additional work 2009, we can go into the editor. If it's something simple, you can go ahead and make a simple change and save it. But if they're going to come back under a new agreement number, perhaps a new fiscal year with a little different purpose, the best thing to do is copy that, and it will label it as copy of Douglas County Inmates Work project.

We'll just go ahead and put here 2009, it'll show a little difference, it's got a different number, and it's still volunteer but it's in 2009, and it will expire in 2009. I'll go ahead and I'll edit a few lines on purpose. I'll go ahead and put a few things in right here and I'll probably delete this line, but let's do this first. I'm going to add what's going happen here, probably after they do a little bit of work, so I'll type Douglas County Inmates Labor 2009 and fill that in when they complete things under recreation and we don't need this one from the old one, so we just delete that and we'll have a completed line right here for 2009, save that and when we go in to take a look at it, it should show up as --- And it'll add copy of to it every time, so what I suggest since I don't like to see that there, is just go back in one more time and take that, delete it, save it, and it should come back as just Douglas County Inmates Work project. So RMiS just wants to add a little bit more text there for you. That will be it.

PA Reports

Next, to run a report on Partnerships and Agreements, go to the office information page and select standard reports. Now as Larry has said, if you would like to see all reports, you can simply pull this toggle down and scroll until you find the report you want; in our case it will be report #10 for Partnerships and Agreements and the details by state and office.

The other way is to narrow down that to partnerships and it will only show those reports related to that. In this case, again, the same report #10. In our case, we'll go ahead and stay the pdf and let's say we're somebody who wants information for an entire state and we'll go to the state of Colorado. We could pull a report on partnerships from any of these field offices, but we'll just leave it on all and run the report. When its run, you're going to notice for that many offices, it'll probably come up with about 100 pages of information. When we scroll down to the bottom, it will tally up all of the values of the contributions of the agreements that we have here. In this case, the Little Snake field office has five partnerships and you'll note that there's the agreement name, its number, the year in which it began, and the expiration year. A contribution amount \$5,000 was documented here and you'll note that you probably won't want to put down in that bottom details when you enter your values, any BLM contributions because it will add it here and then you will not have a truly reflective contribution if you put in BLM amounts here. Rather, go ahead and document BLM contributions, perhaps, in the purpose of the accomplishments to date notes field.

As we run down the list, we can see the many offices and the total of \$5.0 million of contributions. Now because we haven't been on a fiscal year basis up to this point, the five million in Colorado reflects, probably, several years of partnerships and agreements. When the new query is built, we'll be able to focus down on a fiscal year and get that on a specific basis.

Summary

In summary, you should be able to explain the purposes of documenting partnerships in RMiS, what types of agreements there are, the three categories, how to create an agreement, how to edit an existing one, how to retrieve an expired one, and how to run a partnership report.

To review a couple more things specifically, remember to select NEW if you want to see the types of agreements to select from. If one of these 13 don't fit, select other and type in the explanation of what it is in the notes dialog box under purpose.

In review also: Remember you are putting an expiration date on agreements now. If you can't find an old one under existing agreements, you now know to push the "show

expired” button to have it show up in the active partnership list. From there you can bring it back to life. You open an expired one, make a copy, update the information, and save it with a new agreement number or name, whatever fits the occasion.

Here are a few good references for program guidance regarding partnerships and agreements. I won’t read all of them but suggest that you make note of any you think may help you in your particular program.

Well, we’re done. You can relax to this photo of SCA volunteer Todd Ping from Indianapolis who helped me survey in the speedway on the Bonneville Salt Flats. Here he’s floating in 100% saturated salt water in a brine canal on the Salt. This guy said he would sink like lead in water, now bobbing like a cork. Oh, and planners who resist inputting good data in RMiS over the years, end up like West Desert Fester here. I hope this session has helped and wish you the very best.